



Wright Smallcaps Tracker

Small Stocks, Big Potential: Unleash the Wright Smallcaps Revolution.

Investment Objective

This is a high risk equity strategy to participate in high quality small cap stocks. This strategy is specifically build to take advantage of the smallcap rally.

Investment Mechanism

Wright Smallcaps is a data-driven quantitative multi factor tactical strategy based on multiple equity factors based on smart beta & technical combined using position sizing techniques and market regime modelling using machine learning models. This portfolio is expected to generate consistent high returns over time.

Minimum Investment

Rs. 54531

Rebalancing Frequency

Monthly

	Inception	MTD	1M	3M	6M	1Y	2Y	3Y	YTD
Smallcaps	39.3	-4.0	-17.6	-18.9	-16.2	1.8	40.7	29.3	-20.9
Smallcap	32.2	-8.9	-9.9	-9.1	-11.6	5.5	33.4	15.0	-17.9

10 Years Expected Performance

Annualized Returns

Smallcaps

31.8

Smallcap

10.2

Annualized Risk

21.5

34.9

Sharpe Ratio

148.0

29.2

Max Drawdown

-37.5

-50.8

Corr

38.4

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Portfolio Performance

Wright Smallcaps Tracker



Note: Live performance includes rebalances. It is a tool to communicate factual return information and should not be seen as advertisement or promotion.

Month-on-Month Performance

month	1	2	3	4	5	6	7	8	9	10	11	12
2009	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
2010	7.00	3.10	3.20	2.10	0.20	8.00	-3.00	12.20	3.80	11.30	-5.40	2.90
2011	-2.40	1.60	2.00	4.60	2.40	4.60	3.70	-4.50	-8.50	0.70	-9.50	-9.70
2012	3.20	5.70	3.40	-0.60	1.80	10.50	-3.70	0.90	5.30	2.00	1.00	2.00
2013	0.10	-2.30	-7.90	-2.30	6.30	-1.60	-6.50	0.30	4.40	9.90	2.90	7.70
2014	0.70	15.50	18.00	10.90	37.60	10.80	2.00	-1.40	-0.10	7.50	5.00	6.80
2015	2.00	1.70	-2.40	-2.00	8.90	0.10	4.70	-2.50	0.20	0.60	5.90	5.10
2016	3.20	-0.60	4.30	1.10	2.00	7.90	-3.50	8.90	1.80	3.60	-9.80	-1.40
2017	2.60	5.80	11.10	5.70	5.60	4.90	4.30	6.00	1.70	3.80	8.10	8.90
2018	-4.60	-7.40	5.00	-1.40	-9.20	-2.30	9.30	0.40	-17.10	1.20	-0.30	8.90
2019	-2.10	1.40	-8.10	-5.10	4.70	0.70	-11.40	-6.00	1.40	9.70	1.40	7.10
2020	11.30	-0.60	-2.50	6.60	9.20	7.30	20.80	4.50	0.40	3.50	8.20	10.30
2021	0.30	4.20	1.70	6.60	9.30	6.00	11.40	-7.40	4.90	-5.60	-9.10	7.70
2022	2.40	-9.30	2.70	6.40	-7.90	-2.00	5.70	10.40	1.10	1.20	3.90	0.20
2023	-1.90	-11.30	-1.00	9.40	3.90	9.40	16.50	9.80	5.30	1.40	10.10	6.60
2024	11.30	-0.50	-5.20	14.90	0.00	4.80	7.00	5.00	-0.50	-1.10	0.80	-2.40
2025	-17.60	-4.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

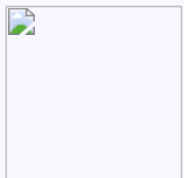
Organisation Overview



Sonam Srivatsava

Founder, Portfolio Manager

- 10+ years experience in Quantitative Trading and Portfolio Management
- HSBC, Edelweiss, Qplum
- IIT Kanpur graduate, Masters in Financial Engineering Worldquant University



Vinod Reddy Kotha

CTO

- 9+ years in Software Development
- Housing.com, Testbook.com, Buyceps.com
- B.Tech, CSE, IIT Bombay



Dr Miquel Alonso

Advisor, Machine Learning

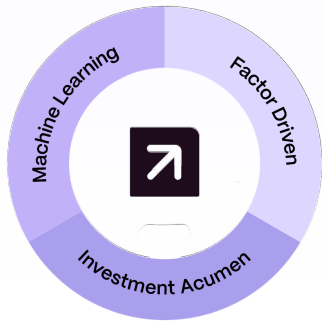
- Founder Artificial Intelligence in Finance Institute
- Faculty - CQF, Columbia, NYU
- Executive Director - UBS

Data Driven Organisation

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Registered Portfolio Manager Reg No: **INP000007979**

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SEBI Registered Investment Advisor Reg No: **INA100015717**

(Validity: Jan 12, 2021 - Perpetual)


SEBI Registered Research Analyst No: **INH000017295**

(Validity: Jul 03, 2024 - Perpetual)

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